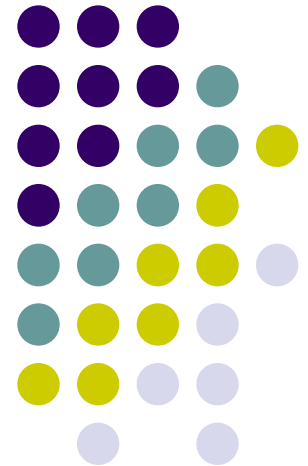


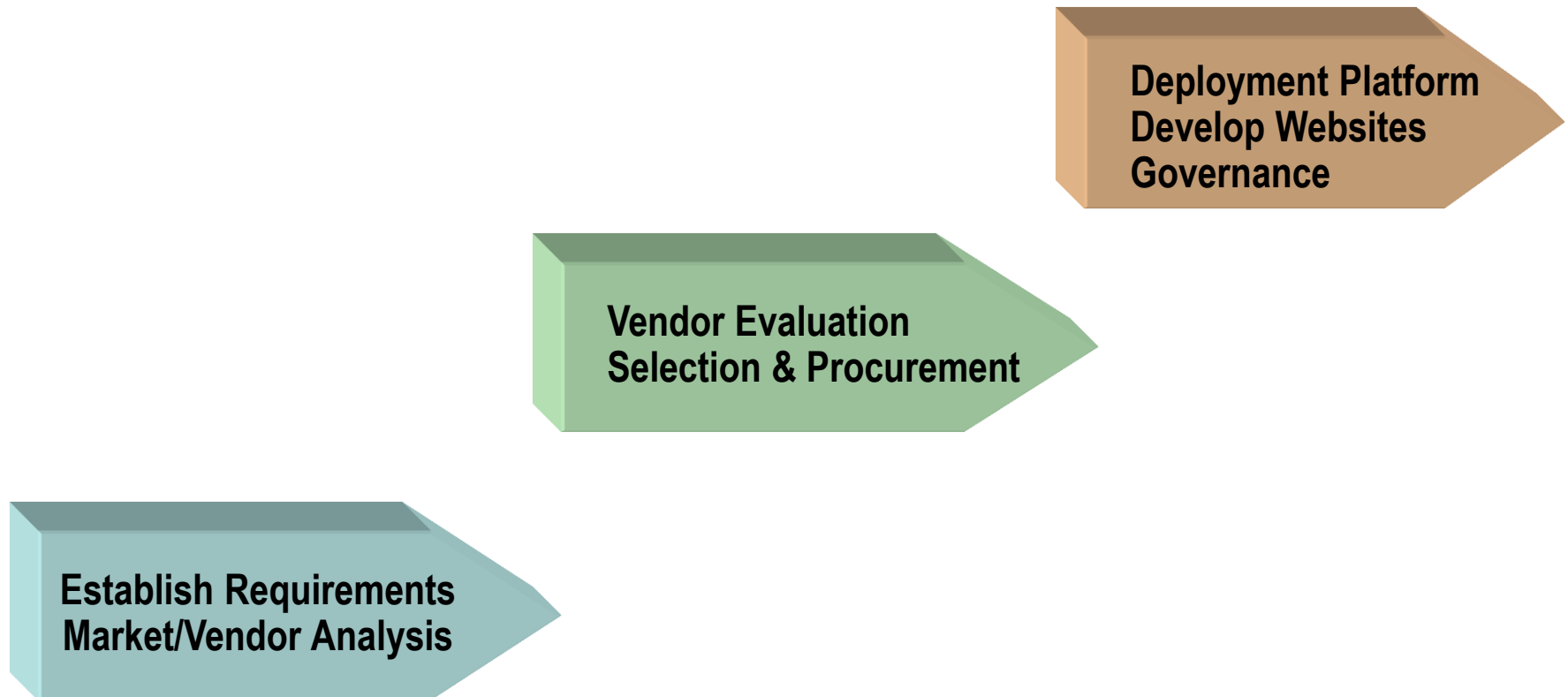
Selecting A Web Platform

Evaluation, Procurement, Deployment

Jeff Geromel
February 2008



Project “Phases”



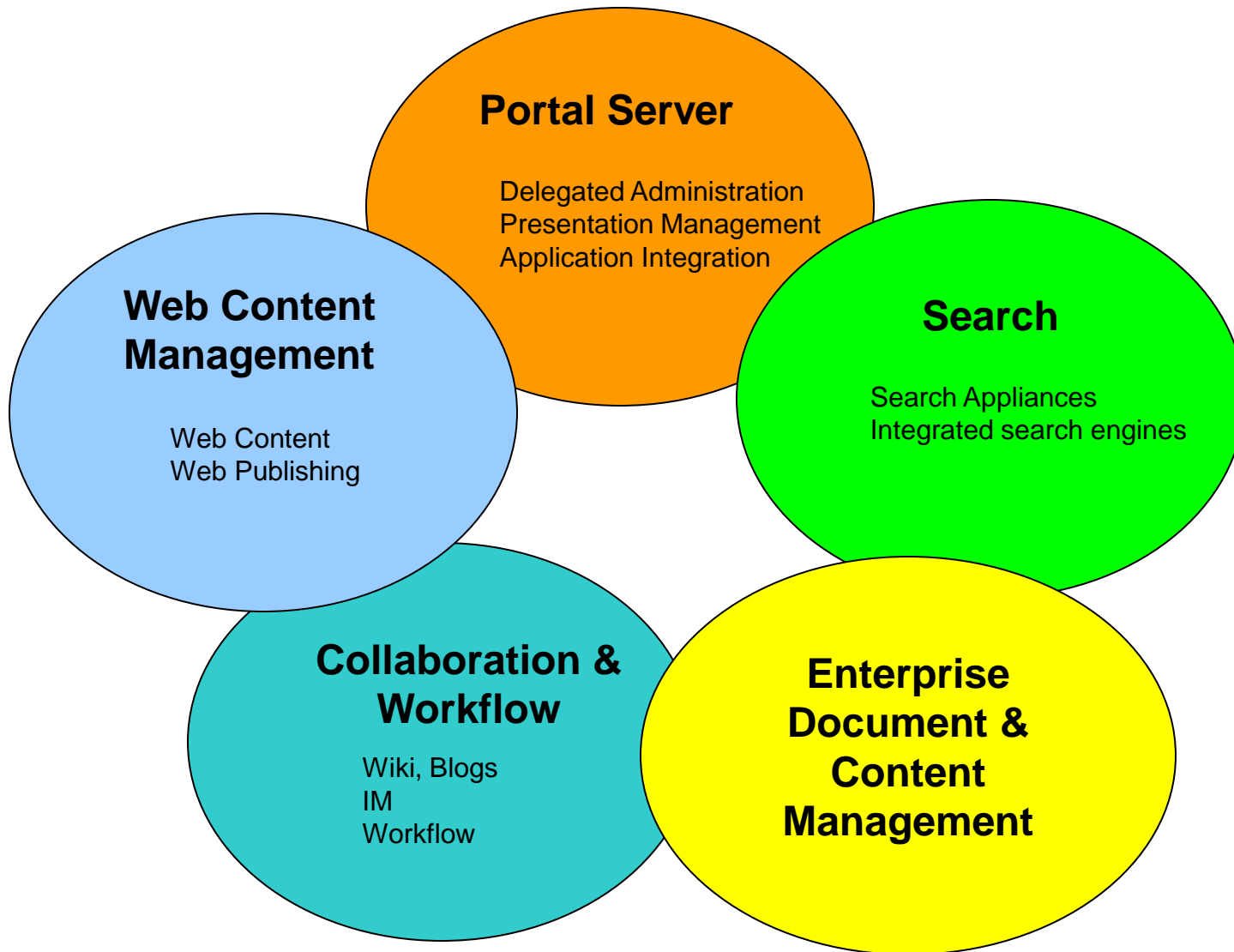
Getting Started



- Determine High Level Scope
 - Business/Technical Requirements
 - Schedule
 - Budget
- Establish Team
 - Technical
 - Executive Sponsor(s)
- Document Plan
 - Charter
 - Projected Schedule

Document and Set Expectations

Solution Categories



Investigate Technology & Marketplace



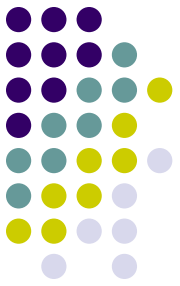
- Use industry research
 - Large analysts firms – Gartner, Forrester, Aberdeen, others
 - Specialized analysts firms
 - www.cmswatch.com has detailed reports on vendors/technologies
- Magazines & Tradeshow
 - Gartner Portals, Content, & Collaboration Conference
 - Many others with different focuses
- Talk with Colleagues
 - Internal & External
- Learn from history
 - Older successful/failed efforts internally/externally

Vendor Types



- Large System Vendors
- Mid-sized Software/Infrastructure
- Smaller
- Niche focused
- Open Source

Vendor Evaluation



- Develop eval criteria, weighting, scoring approach
 - Forrester Wave is a good framework that is customizable
 - Establish enterprise-wide core team for defining and agreeing upon criteria, weighting, scoring
- Evaluation criteria may include
 - Functional - web development, web content management, administration & operations
 - Enterprise Architecture compatibility – platform, scalability, performance
 - Vendor qualifications – viability, pricing, support
- Develop Target Evaluation and Procurement schedule
 - Including tight alignment with procurement/contract team
- Maintain core team throughout the process

Requirements & Evaluation Criteria



In-depth explanations of all criteria and grading rationale

Microsoft Excel - 36542_4s.xls

FORRESTER The Forrester Wave™
Smart data for smart decisions.

eService Q1 2005
Lab-Based Evaluation Across 117 Criteria
by John Ragsdale
Vendor Scorecard: Viventia

Control Level of Criteria Detail
Less —●— More

View Wave Graphic and Custom Scores
Back to Scores and Weightings

Show Criteria and Scale Explanations
Hide Criteria and Scale Explanations

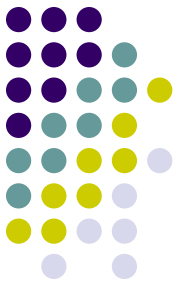
Evaluation Criteria	Criteria Explanation	Scale Explanation	Forrester Weighting	Score	Score Explanation
CURRENT OFFERING			50%	3.8	
Knowledge base	How strong is the product's authored content repository for agents and customer self-service? Do the capabilities and construction of the knowledge base provide a solid backbone for an eService	The score is a weighted sum of the subattributes.	20%	3.5	has spent a lot of time and engineering effort enhancing its knowledge-based offering, and its leading marketing message is now knowledge-powered support."
Problem diagnosis decision engine	Resolving complex problems requires diagnosis by symptoms (technical support, automotive, healthcare self-service). To enable this, knowledge bases need a formal data structure like case-based reasoning (CBR), which provides a metadata layer for organizing.	5 = Best-of-breed functionality 3 = Meets all basic requirements 1 = Does not meet basic requirements 0 = No functionality	15%	4.0	includes case-based reasoning (CBR) and decision-tree capabilities. Decision tree narrows possible solutions as you answer prompts. Can backtrack and change answers if necessary.
Also-see links on content	Also-see links prompt users to see related information to the current content being viewed. Links can be added manually or dynamically generated based on user profile and	5 = Best-of-breed functionality 3 = Meets all basic requirements 1 = Does not meet basic requirements 0 = No functionality	7%	3.0	knowledge articles linked by concepts using case-based reasoning. Supports hyperlinks to include also-see links.
Supports embedded attachments	Embedded attachments let users access and view related articles, diagrams, or pictures.	5 = Best-of-breed functionality 3 = Meets all basic requirements 1 = Does not meet basic requirements 0 = No functionality	9%	3.0	Support attachments on content articles.
Supports embedded multimedia	Embedded multimedia lets users see videos demonstrating procedures or hear sound files explaining	5 = Best-of-breed functionality 3 = Meets all basic requirements 1 = Does not meet basic requirements 0 = No functionality	7%	3.0	Support graphics, video.
Stores content in multiple languages	Supporting global customers means the ability to author translated versions of content, with tools to optimize maintaining these multiple versions of the same content, ideally within a single instance	5 = Best-of-breed functionality 3 = Meets all basic requirements 1 = Does not meet basic requirements 0 = No functionality	15%	3.0	handle by using a separate knowledge base and interface templates for each language, but can be part of a single installation of the product with a single administration console. Customer examples include Creative.com and BankLeumi.
Supports internal and external users	Most knowledge articles should be accessed for both internal (agents) and external (customers) users, with controls to limit some articles, or specific fields or areas of content of some articles, to	5 = Best-of-breed functionality 3 = Meets all basic requirements 1 = Does not meet basic requirements 0 = No functionality	15%	3.0	Metadata on each knowledge object includes access rights for defined user groups.

The Forrester Wave Scores and Weightings Criteria More Info

Weightings and Scores

Explanations for every score

Procurement

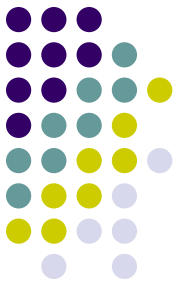


- Create 1-3 year budget projection
- Hold pre-sales deployment/sizing discussions
- Expect detailed pricing negotiations
 - Based on different pricing models
- Don't forget other costs – systems, professional services, training, and support
- Regularly track and re-evaluate budget plans

Deployment Considerations



- Form Deployment planning working team early on
 - Establish current/projected architecture – as-is and to-be
 - “Stage environment” according to budget/priorities/timeframe
 - Don’t underestimate training, testing, production constraints
- Don’t forget training and professional services at start
- Determine federated or centralized planning/governance model
 - Communicate overall strategy and roadmap
 - Establish CSS, Templates, Accessibility standards
- Identify first friendly website to develop
- Establish project manager from the start
- Form alignments with other projects in organization



Q & A